

FITNESS SERVICES AS AN ELEMENT OF THE SYSTEM OF HEALTH-ORIENTED MANAGEMENT: THE OVERVIEW OF DEVELOPMENT TRENDS IN UKRAINE

ФІТНЕС-ПОСЛУГИ ЯК ЕЛЕМЕНТ СИСТЕМИ ЗДОРОВ'ЯОРІЄНТОВАНОГО УПРАВЛІННЯ: ОГЛЯД ТЕНДЕНЦІЙ РОЗВИТКУ В УКРАЇНІ

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Abstracts

The aim of this work is to study the place and role of fitness services in the system of health-oriented management and to make the overview analysis of the development trends of these services including the impact of war situation in Ukraine. **Materials and methods.** The theoretical basis of this research is the fundamental provisions of sport management & marketing science, health-preserving statements and general economic theory. The information basis for this research was official sources of leading Ukrainian information resources. The methodological basis of the study consists of a set of such methods and techniques: induction and deduction; monographic; institutional analysis, analysis of Internet resources, comparative analysis, generalization and abstraction; integrated and systematic approaches. **Results.** Fitness services occupy a special place in the organization's health-oriented management system. They create opportunities for the health preserving of employees outside the organization, while at the same time referring to one of the measures of health-oriented management inside the organization, which in the future form its health-oriented environment. In the modern conditions the market of fitness services of Ukraine, the following is inherent: a high level of competition; expanding demand for the fitness services and the desire for more flexible forms of trainings; expanding the range of services offered by fitness clubs. The realities of war change the requirements for the fitness trainers: soon we will need trainers who can improve physical and mental conditions of their clients (rehabilitate military personnel, restore the mobility of civilians' bodies, conduct conscious trainings for the health; pay more attention to the emotional state of clients, adjust the load to the level of fatigue, monitor own mood, help distract yourself from negative thoughts thanks to new exercises). At the same time, the realities of war will stimulate fitness centers to change their approach and develop special preferential packages for the people affected by the war. **Conclusions.** The conducted study demonstrated the importance of such an element as "fitness services" in the system of health-oriented management. Fitness services occupy a significant share in the structure of the country's sports and health services market. In modern conditions, the fitness industry of Ukraine is experiencing a new, ambiguous development cycle: on the one hand, the war and its socio-economic consequences cause a negative impact, and on the other hand, these consequences contribute to the development of new forms and methods of conducting classes.

Key words: fitness services, health, health-orientes management, fitness centers, the conditions of war.

Метою цієї роботи є дослідження місця та ролі фітнес-послуг у системі здоров'яорієнтованого управління та проведення оглядового аналізу тенденцій розвитку цих послуг з урахуванням впливу воєнної ситуації в Україні. **Матеріали та методи.** Теоретичною основою дослідження є фундаментальні положення науки про спортивний менеджмент і маркетинг, положення про здоров'язбереження та загальної економічної теорії. Інформаційною основою дослідження стали офіційні джерела провідних українських інформаційних ресурсів. Методологічну основу дослідження становить комплекс таких методів і прийомів, як: індукція та дедукція; монографічний; інституційний аналіз, аналіз

інтернет-ресурсів, порівняльний аналіз, узагальнення та абстрагування; комплексний і системний підходи. **Результати.** Фітнес-послуги посідають особливе місце у системі здоров'яорієнтованого управління організації. Вони створюють можливості для збереження здоров'я співробітників за межами організації та водночас належать до одного із заходів здоров'яорієнтованого управління всередині організації, що в майбутньому формує її здоров'язбережувальне середовище. У сучасних умовах ринку фітнес-послуг України притаманні: високий рівень конкуренції; розширення попиту на фітнес-послуги та прагнення до більш гнучких форм тренувань; розширення спектра послуг фітнес-клубів. Реалії війни змінюють вимоги до фітнес-тренерів: незабаром нам знадобляться тренери, здатні покращувати фізичний та психічний стан своїх клієнтів (реабілітувати військовослужбовців, відновлювати рухливість тіл цивільних, проводити свідомі тренування для здоров'я; приділяти більше уваги емоційному стану клієнтів, регулювати навантаження до рівня втоми, стежити за власним настроєм, допомагати відволіктися від негативних думок завдяки новим вправам). Водночас реалії війни стимулюватимуть фітнес-центри змінювати підходи і розробляти спеціальні пільгові пакети для осіб, котрі постраждали від війни. **Висновки.** Проведене дослідження продемонструвало важливість такого елемента, як «фітнес-послуги», у системі здоров'яорієнтованого управління. Фітнес-послуги займають вагомую частку у структурі ринку спортивно-оздоровчих послуг країни. У сучасних умовах фітнес-індустрія України переживає новий, неоднозначний виток розвитку: з одного боку, війна та її соціально-економічні наслідки спричиняють негативний вплив, а з іншого – сприяють розвитку нових форм та методів проведення занять.

Ключові слова: фітнес-послуги, здоров'я, здоров'яорієнтоване управління, фітнес-центри, умови війни.

Introduction. The modern world cannot be imagined without the service sector, which is developing extremely dynamically and plays the important role in the economic life of society as by the part of consumer spending on services and employment of employees, and by the amount of direct investments. Against the background of the positive dynamics of development of the service sector, more and more attention is being paid to the study of the sphere of sports and health services.

The development of the industry of sports and health services is facilitated by society's orientation towards a healthy lifestyle, work activity and a new way of entertainment for modern people. It involves significant financial resources and numerous human resources. Currently, the degree of development of the sphere of sports and health services is one of the factors that affects the rate of society development, the level and quality of life of the population, and its business activity.

Considering this aspect of the impact on the economy, it should be noted that sports and health services should be considered in the system of health-oriented management of the organization, because they are mostly used by working people who receive stable financial income. On the other hand, a physically and mentally healthy employee is a guarantee of the economic efficiency of the

organization, because the proper level of health of the personnel is the resource that ensures increasing the productivity of the employees, their dedication and motivation to the work.

Currently, in the conditions of war, the Ukrainian state is experiencing a difficult period of socio-political and economic development, a stage of various threats and challenges, etc. All this deepens the crisis in the country, spreads poverty, and increases the social stratification of society, which has led to sharp dissatisfaction of the population with their standard of living. In these conditions, the determination of the state and development of trends of socially important spheres of human life, including the sports and health sphere, becomes particularly relevant.

Sports and health service is a type of physical culture and sports activity based on the using of different types of sports for the purpose of preserving and strengthening people's health, involving them in the values of sports, and forming healthy lifestyle skills [12]. That is, the main purpose of providing these services is to improve the health of the population and support its reproductive qualities. Today, in many countries, the provision of sports and health services has formed a separate market, ensuring the achievement of a significant socio-economic effect in the development of human capital and increasing the level of well-being of the population [19].

The provision of sports and health services involves the maintenance of a network of sports and health facilities and the organization of services for visitors during classes, the organization and provision of sports competitions and spectacular events, trade, rental and repair of sports equipment, etc. All this in a complex forms the infrastructure of the sports and health services market [19].

Scientists distinguish the following three types of sports and health services [9; 21]:

1. *Basic* sports and health services are services for which a person, depending on the pursued goal (health, recreation, rehabilitation, physical perfection), is directly involved in the process of physical activity.

2. *Accompanying* sports and health services (temporary comfort) for a person in his/her physical activities, in his/her active recreation. For example, provision of convenient service during the entire period of visiting sports facilities, services for temporary storage of a person's personal belongings (wardrobe, changing room, storage room), etc.

3. *Service* sports and health services are services for which during the direct process of their provision, the person's participation is less active (in the case of massage – passive) or they take place without his/her active participation. For example, massage services, drawing up an individual program of classes, counselling on the physical and psychological state of the person engaged in, etc.

There are also sports and health services [1; 8]:

– “for yourself” – a service that meets the sports and health needs of a person in his/her individual or team motor activity in competitions;

– “for higher achievements” – a service that satisfies the mass need of spectators to observe the sports and entertainment process (action, event).

Quite numerous of scientists among sports and health services give place to fitness services, in particular [1–3; 8; 10–12; 18–21; 23].

According to data from literary sources [2; 3; 7; 10; 23] this type of service has the following properties:

1. They are immaterial and intangible (they cannot be felt until the moment of receipt), inseparable from the entities that provide them, variable in quality, incapable of preservation.

2. There is a wide variety of services and products in the fitness industry, but they are easily interchangeable with other services. The possibility of replacement (substitutability) leads to a sensory reaction of the price of these services on the part of customers.

3. These services are non-standard, they require an individual approach to the client, taking into account his/her features and goals of receiving these services. The qualification of the staff is of great importance for the perception of the quality of fitness services for the consumer.

Despite the existing theoretical basis for the study of the state and prospects of the development of fitness services sphere in Ukraine, it should be noted that there is no unified approach to determining their place in the system of health-oriented management, as well as taking into account the aspect of war when analyzing them.

For this reason, the **aim** of this work is to study the place and role of fitness services in the system of health-oriented management and to make the overview analysis of development trends of these services including the impact of war situation in Ukraine.

To achieve the aim, we have solved the following **tasks**:

1) to determine the place and role of fitness services in the system of health-oriented management of organization;

2) to analyze the fitness services place at the sports and health services market in Ukraine;

3) to characterize the impact of the war on the fitness industry in Ukraine.

Materials and methods.

The theoretical basis of this research is the fundamental provisions of sport management & marketing science, health-preserving statements and general economic theory. The information basis for this research were official sources of leading Ukrainian information resources about the state and prospects of the development of fitness services sphere in Ukraine, the State

Statistics Service, the FitnessConnectUA, the FitnessAcademy.Ukraine and web-sites of the main fitness clubs on the Ukrainian fitness services market. The methodological basis of the study consists of a set of such methods and techniques: induction and deduction; monographic; institutional analysis, analysis of Internet resources, comparative analysis, generalization and abstraction; integrated and systematic approaches.

Results.

1. Fitness services in the system of health-oriented management of organization

Management based on a human-centered approach, focused on the fact that the highest value of the organization is not just human resources, but the health of each individual employee, is defined as health-oriented management [6]. It should be noted that human management in this context is a significant factor in

the working life for subordinate employees. The complexity of the process of implementing the health-oriented management is conditioned due to the many variable processes, multifacetedness and variety of conditions that arise in working conditions.

A health-oriented management system is a set of consistent and interrelated measures implemented within the organization with the aim of maintaining the appropriate level of health of employees. A typical system of health-oriented management of the organization is presented in Fig. 1.

A special place in this system should be given to the element “season tickets for visiting swimming pools, gyms and fitness centers”, which in modern conditions of the development of labor relations are an integral part of the social package of an employee of almost every organization.

The interest of employees in the season tickets for visiting fitness centers is confirmed by

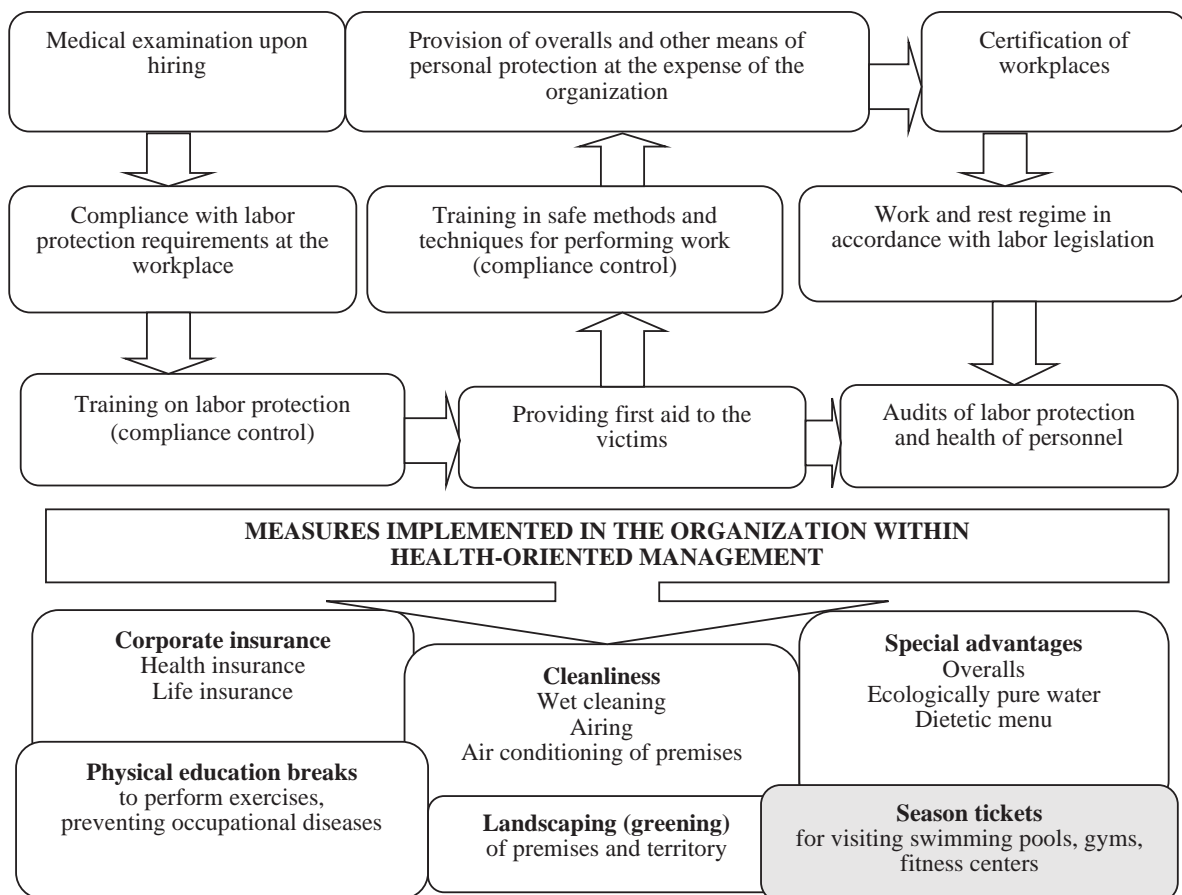


Fig. 1. A typical system of health-oriented management of the organization

Source: [6; 24; 25].

research data [6]. On the question “Where during the day are you ready to improve your physical health?” 14.9% of the interviewed persons of various ages answered that they are ready to improve their physical health in fitness centers (Fig. 2).

It is worth noting that in private communication, heads of organizations indicate that in wartime they are ready to spend more money on additional financing or full payment of season tickets for visiting fitness centers for their employees, because during regular air raids in the country, they are not ready to take responsibility and ensure the safety conditions for sports and health activities within the organization.

2. The overview of the fitness services at the sports and health services market in Ukraine

An important indicator of the development of the sports and health services market is the volume of services provided by sports organizations. Regionally, the largest volumes of sports services in 2020 were provided in the city of Kyiv, Dnipropetrovsk, Kharkiv, Lviv and Odesa regions, which is natural from the standpoint of the population in these regions.

Along with this, the dynamics of the highest rates (an increase of almost 3–6 times) of the sports and health services market for the period 2015–2020 are observed in Dnipropetrovsk (+619%), Kyiv (+670%), Vinnytsia (+369%), Zhytomyr (+361%), Donetsk (+455%), Ternopil (+398%) regions [11]. We should also note that according to the data of the State Statistics Service [4], the volume of services provided by the type of economic activity “Activity in the field of sports” as of the 4th quarter of 2022 amounted to UAH 372628.9 thousand, including services to the population – UAH 77777.5 thousand.

The market of sports and health services of Ukraine covers almost 57 thousand enterprises, institutions, organizations that carry out sports and health work, 4576 sports clubs, 1672 children’s and youth sports schools, 32 schools of higher sports skills, 17 specialized sports profile institutions [18].

The main players in the domestic market of sports and health services remain the chains of fitness centers of the middle price segment,

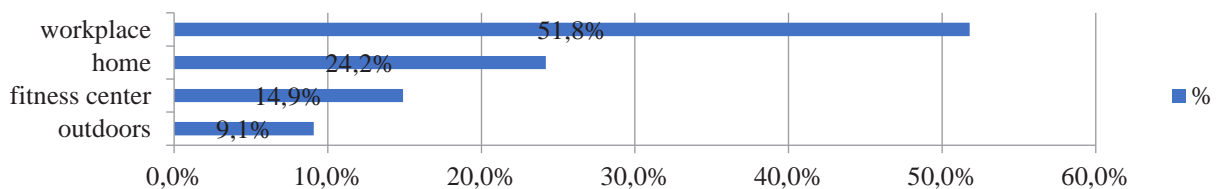


Fig. 2. Analysis of the preferences of the interviewees regarding the choice of a place for recreational activities, (%)

Source: [6].

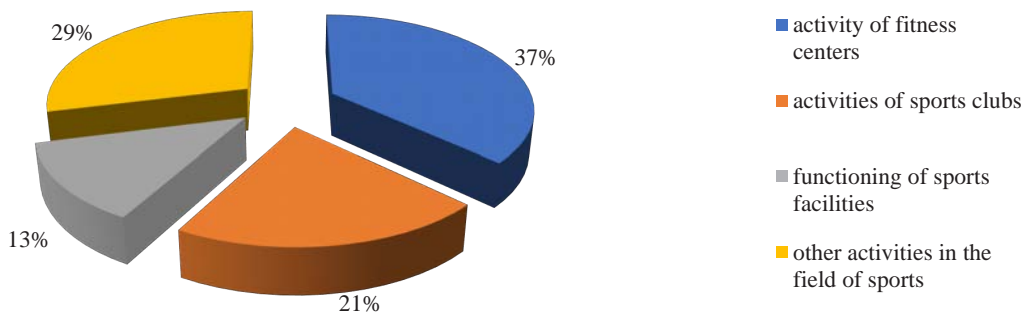


Fig. 3. Structure of the sports and health services market in Ukraine in 2019, %

Source: [20, p. 104].

which make up 37% of the total number of business entities in this market (Fig. 3).

According to the experts of the information and analytical platform FitnessConnectUA [5], before the start of the full-scale invasion of russia, there were about 1765 fitness facilities in Ukraine. Most of them can be called full-fledged fitness clubs (Fig. 4), although small studios of various directions are gaining more and more popularity. This indicates a growing interest in a healthy lifestyle among the population.

At the moment, the exact number of active fitness clubs in Ukraine is unknown. There are no

official statistics on this topic, and data from different sources vary. There is no single register of fitness clubs in Ukraine, so it is difficult to obtain accurate data on their number.

Considering the competitive situation in the market of fitness services in Ukraine before the war, it is worth noting that it was influenced by the following factors: price, quality of services, location, marketing, innovations, etc. (Fig. 5).

As we can see from the Fig. 5, the most important factor that affects the choice of Ukrainian consumer in the market of fitness services is the season ticket price. Prices for the fitness ser-

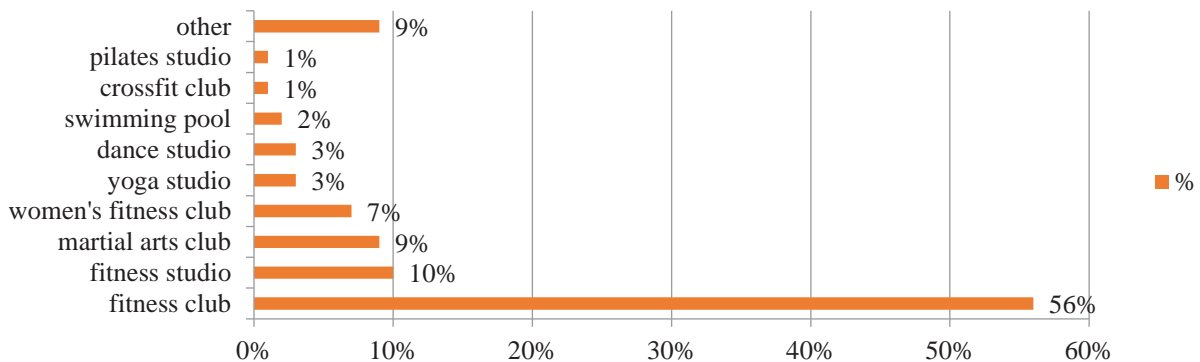


Fig. 4. Distribution of fitness facilities by type

Source: [5].

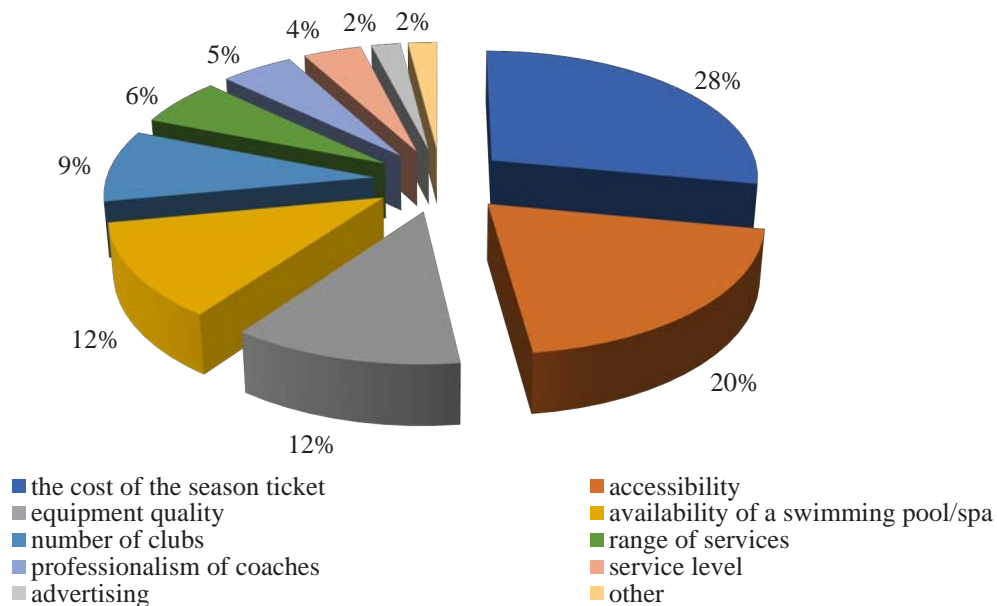


Fig. 5. Influence of factors on the competitor's situation in the market of fitness services

Source: [5].

vices in Ukraine are much lower than in developed countries. The average price of an annual season ticket for the fitness club in Ukraine in 2022 is UAH 8.500 (\$235), while in the USA a similar season ticket costs about \$1.000, and in Germany – about €800. This difference in prices makes fitness more affordable for Ukrainians, which can stimulate further market growth [5].

It should be added that in wartime, another important item was added to this list – the security. Clubs that have an indoor shelter or an existing bomb shelter within reach will gain potential and possibly existing customers an advantage over clubs that can't secure their customers.

The percentage of users of fitness services in Ukraine are 2.9% and is relatively small compared to other European countries (in Sweden, Denmark, Norway – more than 20% of the population are fitness services users). Most users of fitness services in Ukraine are people aged 31–35 (17%), while in European countries these are people aged 27–33. Regarding the distribution of users of fitness services by gender, women predominate: 56% comparing to 44% of men [5].

The structure of the fitness services market in Ukraine includes: network fitness clubs, independent fitness clubs and fitness studios. Separately, should be singled out 5 the most widespread network fitness clubs in Ukraine by the number of establishments as of September 2024 (FitCurves, SportLife, AtletiKo, Total Fitness and Apollo Next), which are presented in Fig. 6.

Despite the steady growth, the market of fitness services in Ukraine faces a number of challenges. Firstly, the war with Russia, which had a

negative impact on the country's economy and led to a decrease in the purchasing power of the population. The war led to a drop in consumer demand for the fitness services as many people lost jobs, incomes, and access to fitness centers. On the other hand, a new reality emerged that stimulated the development of new trends and formats of the fitness industry in Ukraine.

3. The impact of the war on the fitness industry in Ukraine

The impact of the war on the market of fitness services in Ukraine was not uniform throughout the country. Undoubtedly, the regions where active hostilities are taking place are the most affected. Many fitness centers were forced to close, and those that remained were operating with restrictions.

The “Fitness Academy.Ukraine” company conducted its own research [22] to understand how the demands of clients and the approach of trainers have changed since the beginning of the war, as well as to find out the general changes in the fitness industry.

Totally 104 people took part in the survey, 88.5% of them were trainers. Others are sports club owners, sales managers and administrators.

The survey showed that the majority of coaches remained within Ukraine from February 24, 2022: 63.5% in their city, 12.5% moved to another city or region. The vast majority – 90.1% of trainers have already resumed trainings. 50% of them returned to classes in the spring of 2022.

56.7% of trainers claim that they have more clients than before the full-scale invasion. And 60.6% of the respondents increased the cost of their services. 59.6% of trainers upgraded their skills after

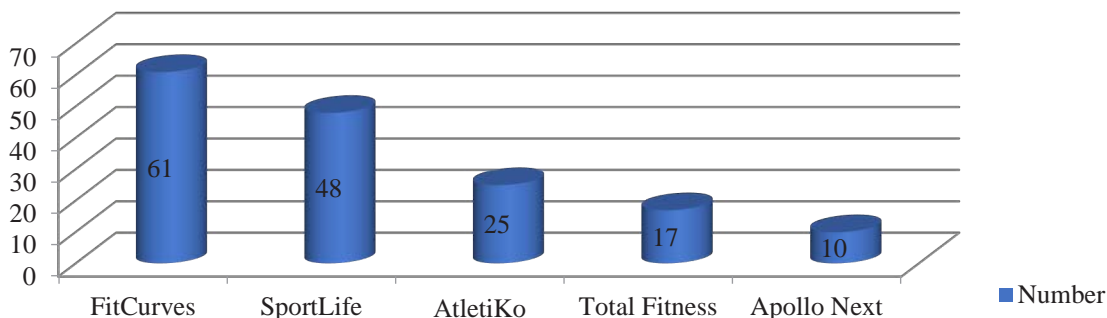


Fig. 6. Ratio of the number of network format fitness clubs

Source: [13–17].

the full-scale invasion. At the same time, those who continued to study naturally increased their earnings and the number of clients (Fig. 7).

Did you get advanced training after the full-scale invasion?

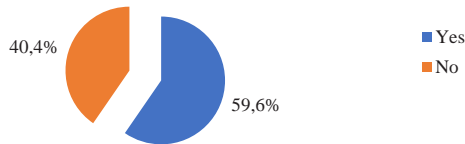


Fig. 7. Improving the qualifications of the fitness trainers after the beginning of the full-scale invasion of russia

Source: [22].

In addition, half of the trainers have mastered new areas of fitness. 33.3% of respondents mastered one new direction, 16.7% additionally mastered 2 or more directions. 34.2% of trainers have not changed anything, and 17.6% are just planning to learn something new.

Since February 24, 2022, most customers have changed their requests. Rehabilitation, emotional relief and relaxation, restoration of physical and emotional peace are relevant now. Therefore, the trainers had to find a new approach:

- to give more support and personal communication;
- adjust workload to the level of fatigue and psychological exhaustion of clients;
- diversify trainings, become more versatile.

Also, the majority of clients and trainers (52%) now prefer offline training. 8.2% train only online, and 39.8% combine both formats (Fig. 8).

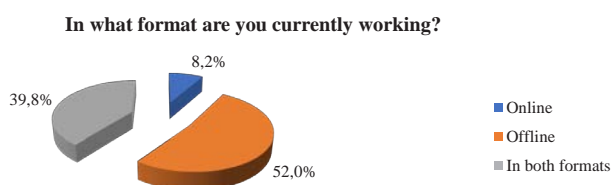


Fig. 8. The format of fitness trainings after the start of the full-scale invasion of russia

Source: [22].

A full-scale invasion hit the psycho-emotional state of almost every one of us. Ukrainians. Everyone is stressed out by air raids, missile

attacks, news and general danger. It is difficult for both clients and trainers. Therefore, 12.5% of the surveyed specialists began to doubt that fitness is their sphere. The other 85.5% of trainers are sure that they want to work in this field.

Similarly, summarizing the results of this survey, we can draw the following conclusions: many specialists lost clients, but instead gained new ones; the cost of services has increased, as has the number of customers; customers now need more personal and empathetic approach; trainers continue to study, improve their qualifications and master new directions.

Also, nowadays, some fitness clubs have already developed a system of discounts for the people affected by the war. And others, in the order to maintain their competitive positions in the market, will also have to develop preferential packages of services as part of philanthropic corporate social responsibility, which Ukrainian society is actively interested in today.

Such a preferential package of services for the persons affected by the war should include a set of measures for such a target audience as: families of military personnel, victims of russian aggression, forcibly displaced persons, whose status is confirmed by relevant documents (Fig. 9).

To study the needs of the target audience of the preferential package, the fitness centers should cooperate with local authorities and attract famous Ukrainian athletes to popularize the preferential package and raise the morale of the people affected by the war.

Conclusions.

1. Fitness services occupy a special place in the organization's health-oriented management system. They create opportunities for the health preserving of employees outside the organization, while at the same time referring to one of the measures of health-oriented management inside the organization, which in the future form its health-oriented environment. By providing their employees with season tickets for visiting fitness centers as part of a social package, organizations not only invest in the health capital of their employees, but also end up with motivated and loyal to the organization employees with the appropriate level of health.

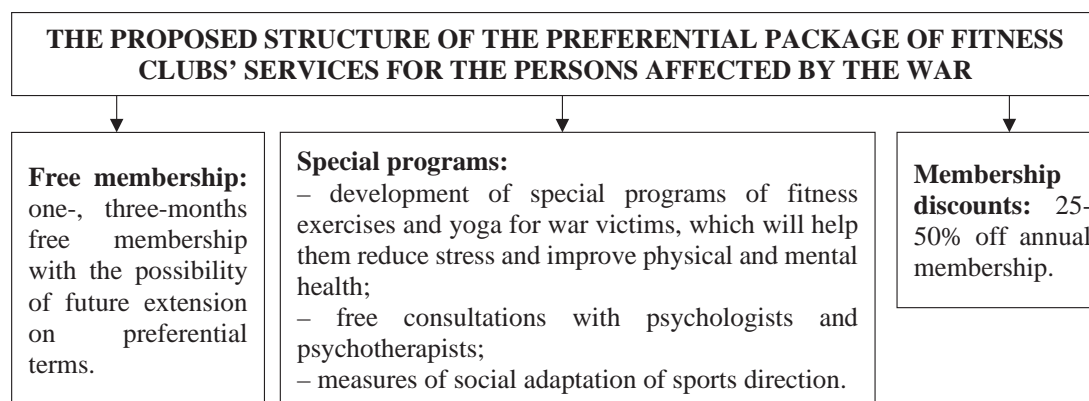


Fig. 9. The proposed structure of the preferential package of fitness clubs' services for the persons affected by the war*

* Note: to ensure financial stability, it is worth introducing a quota for the number of season tickets within the framework of a preferential package of services (for example, 10–15 season tickets per month for one active fitness club).

2. In the modern conditions the market of fitness services of Ukraine, the following is inherent: a high level of competition; expanding demand for the fitness services and the desire for more flexible forms of trainings; expanding the range of services offered by fitness clubs. In our opinion, in the near future, the popularity of online trainings, personal trainings and boutique clubs (studios), as well as the introduction of innovations and virtual reality technologies to attract the attention of consumers, will grow.

3. The realities of war change the requirements for the fitness trainers. Thus, in the future, Ukrainians will need trainers who can improve their physical and mental condition: rehabilitate military personnel, restore the mobility of civilians' bodies, conduct conscious trainings for the health; pay more attention to the emotional state of clients, adjust the load to the level of fatigue, monitor own mood, help distract yourself from negative thoughts thanks to new exercises. At the same time, the realities of war will stimulate fitness centers to change their approach and develop special preferential packages for the people affected by the war. The expected results from the implementation of the proposed measures of preferential package will be: improvement of the physical and mental health of war victims, reduction of their stress and anxiety levels; improving social cohesion and a sense of belonging to the community, as well as

strengthening the positive image of those fitness centers that will provide them; and will also help strengthen their connection with the public and support people in need.

Conflict of interest. The authors state that there is no conflict of interest.

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